

Please complete this form if you are considering paying your Annual Allowance charge using Scheme Pays and you think that your Annual Allowance charge will be greater than £2,000.

Complete the form in BLOCK CAPITALS and return to The Pearson Pension Plan, Mezzanine Floor, 80 Strand, London, WC2R 0RL

We will check if you are eligible for Scheme Pays and, if you are, we will provide you with details of the reduction in your benefits in the Plan and a Scheme Pays application form for you to complete.

Your personal information

Surname (Mr, Mrs, Miss, Ms, Other)		Forename(s)
Reference number*		
Address		
		Postcode
Telephone number	Email address	

*Your reference number can be found on your pension savings statement.

Your Scheme Pays information

In which tax year did you exceed the Annual Allowance (e.g. 2017/18)	
Your threshold income for the tax year above	
Your adjusted income for the tax year above	
Your Annual Allowance for the tax year above	
Your Pension Input Amount for the tax year above	
Any unused carry forward	
Your excess above the Annual Allowance for the tax year above	
Total Annual Allowance charge you wish to pay using Scheme Pays	



Awarded for the
Plan's Money Purchase
2003 section



Scheme Pays quote request

For guidance on what your threshold income and adjusted income are, please refer to the guide to your pensions savings statement. Further information is also available on the Annual Allowance webpage: www.pearson-pensions.com/annual-allowance

Please note that your Annual Allowance and any Annual Allowance charge is not shown on your pension savings statement. Your pension savings statement provides you with information about your benefits in the Plan to assist you with calculating these amounts.

Information on how to calculate whether there is any tax to pay is available in the guide, the webpage and at: www.gov.uk/tax-on-your-private-pension/annual-allowance

You will need to make a separate quote request each year you exceed the Annual Allowance.

Signature	Date
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